

Department of Economic, Housing and Community Development
Community Planning and Revitalization Division



Municipal Planning Grants Applicant Users Manual

Version 1.0

Grants Management System

10/2010

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1. System Requirements

The Grants Management System (GMS) was designed so that the vast majority of computer users will be able to use the system with little or no change to their computer environment. The four requirements that are mentioned below are common computer elements that should be already present on most machines.

The GMS requirements listed below can also be viewed on the system itself by clicking the "review the system requirements" link from the system homepage.

1.a. Operating System

The GMS was designed for both of the two most common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing the system from a Macintosh environment are required to have MacOS 7.5 or higher running on a PowerPC processor. Windows users are required to have an operating system that is Windows 95 or higher.

1.b. World Wide Web Connection

The GMS is an Internet application. It is accessed via the Internet and was specifically designed for Internet use. The Internet is the more general term that is typically used to refer to the World Wide Web. The World Wide Web consists of a vast array of content that is accessible via a web browser. For the purpose of accessing the Development GMS, the standard Internet connection is via a modem connection. A modem is a piece of hardware that connects to the computer to send data through a phone line to and from the computer. Internet connections that are "faster" than a modem connection, such as cable and DSL, will improve the speed at which the system operates, but are not necessary in order to use the system. If you are in an office environment, you may already have an Internet connection, but if you are unsure, please contact your organization's network administrator.

For those using a dial-up connection over a modem, it is highly recommended that you have a modem connection speed of at least 33.6 kbps (kilobits per second).

1.c. Web Browser

This system was designed to be compatible with common up-to-date web browsers including: Internet Explorer, Firefox, Safari, and Opera.

1.d. Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat Reader you may choose to view, print, or save these documents. If you do not have an Adobe Acrobat Reader you can go to www.Adobe.com and download one for free.

2. The Grants Management System Homepage

To access the Grants Management System, type <http://development.grants.vermont.gov> into the address bar of your web browser and hit "Enter".

The page you see should look like the image shown below.



VERMONT Development Grants Management System
State of Vermont

Welcome to the State of Vermont's Agency of Commerce and Community Development (ACCD) Grants Management System. This system was designed to help both the State and the State's grantees to more effectively organize and manage grant-related information. Please choose from the list of options below:

- New User Access
 1. Each Municipality/Organization must designate an Authorized Official.
 - [New User Registration Guide](#)
 2. ACCD will validate only the Authorized Official.
 3. The Authorized Official is responsible for defining the roles/responsibilities of local users of the system. A local user will click on "New User" link (shown to the right), and enter his or her contact information including a user name and password. The local Authorized Official will then validate those individuals.
 - [New User Activating Guide for CEOs](#)
- [Department of Housing and Community Affairs's \(DHCA\) home page](#)

For ACCD Grants site technical assistance please contact cindy.blondin@state.vt.us or 802-828-5219.

Please [click here to review the system requirements](#).

LOGIN

Username

Password

[New User?](#) [Forgot Password?](#)

Powered by IntelliGrants © Copyright 2000-2007 State Software, Inc.

2.a. Browser Configuration

In order to avoid various browser-related restrictions unnecessarily placed on the GMS, please make the following configuration changes for the web-browser that you are using.

2.b. Internet Explorer

If you are using Internet Explorer, it is recommended that you add the GMS homepage to your list of trusted sites. To do this, please complete the following steps:

- 1) Click "Tools"
- 2) Click "Internet Options"
- 3) Click the "Security" tab
- 4) Click "Trusted Sites"
- 5) Click the "Sites" button
- 6) In the "Add this Web site to the zone:" textbox type "http://development.grants.vermont.gov/" and then click the "Add" button
- 7) Click the "OK" button, and then click the "OK" button again

3. Gaining Access to the GMS

In order to use the system you must first be granted access to it. There are two basic ways to get access to the GMS.

You may either

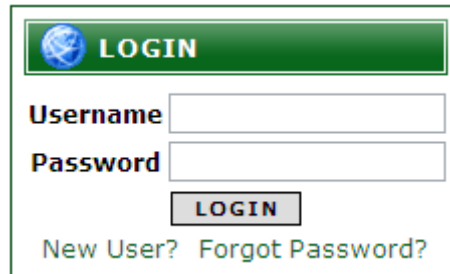
1. Request access to the system and get approved by a DEHCD system administrator
- or
2. Be granted access by someone from within your own organization

Both of these two processes are described below.

Definitions of roles throughout this manual can be found in Section 10 of this manual.

3.a. Gaining Access Through a System Administrator.

The first way to get access to the system is by being approved by a Department of Economic, Housing and Community Development (DEHCD) system administrator. This process is used if you are the first user from your organization or municipality that needs access to the system, and in this instance, the system administrator will be a representative from the Agency/Department you are applying to.



- 1) From the Grants Management System homepage, click the “New User?” link located in the “Login” section.
- 2) Complete the user form in its entirety.
 - a) The 'Username' field must consist of all letters or numbers and must be between 5 and 12 characters long.
 - b) The 'Password' field must consist of all letters and/or numbers and must be between 7 and 12 characters long.
 - c) The fields 'Password' and 'Confirm Password' must be the same.
- 3) Click “Save” to save the data.

Having saved your contact information, your account must then be validated by a system administrator before you can access the system. If you are an Authorizing Official please contact DEHCD to have your account validated.

If you attempt to access the system prior to getting validated by a system administrator you will receive the following message:

Your account has not been validated yet.

When access has been granted to you by a system administrator you will receive an email message confirming that your account has been validated. You may log into the system and begin to create other users accounts.

“Locked Out” from login. If you receive this error message due to excessive attempts to login, you must **wait 15 minutes** before attempting to login again.

Forgotten Password: If you’ve forgotten/lost your password, but know your user name, please click on “forgot password” within the login box, type in your user name and email address (email address must match the address in your contact information). You will receive a temporary password from the GM System. If you don’t know your user name, please call a system administrator at DEHCD for assistance.

3.b. Gaining Access Through Another in Your Applicant Organization

Instructions can also be found on the Login page of the Grants Management System: the New User Registration Guide; or the New User Activating Guide for Authorizing Officials.

The second way in which you can get access to the system is by having a user from your organization or municipality add you to the system. In order for this to occur, the user must be assigned the role as an Administrator or Authorizing Official. In the same way, if you have been assigned one of these roles you may also add users to the system.

- 1) The Administrator or Authorizing Official must first login to the system.
- 2) From the Main Menu the organization's administrative user must then click the name of the Organization in the My Organization section for which they would like the new user added. (The administrative person will see the Organization's name as well as a role of either Administrator or Authorizing Official.)
- 3) At the bottom of the Organization screen is an "Organization Members" section. By default the "Current Members" tab will be active and below it will be listed various members of the organization. If the person whose account must be added is not shown, the organization's administrative user should click the "Add Members" tab.

ORGANIZATION MEMBERS				
<div>1: Current Members 2: Add Members</div>				
<input type="checkbox"/>	Person	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/>	Allen, Dan IGAdmin	IntelliGrants Administrator	7/27/2008 -	Allen, Dan Sysadmin
<input checked="" type="checkbox"/>	Ingulsrud, Faith	Municipal/Authorizing Official	8/4/2008 -	Krauss, Mrs. Coleen
<input checked="" type="checkbox"/>	Minter, SueAO	Municipal/Authorizing Official	8/5/2008 -	Tudor, Wendy
<input checked="" type="checkbox"/>	Tudor, Wendy	Municipal/Authorizing Official	7/10/2008 -	Tudor, Wendy
<input checked="" type="checkbox"/>	Tudor, WendyAO	Municipal/Authorizing Official	6/24/2008 -	Krauss, Mrs. Coleen

- 4) After clicking the tab, the organization's administrative user should first search for the person that he or she wishes to add by typing in part of the user's name into the "Person Search" box and then by clicking the "Search" button.
 - a) If the user exists in the system, he or she will be shown below the search box. The "Selected" checkbox should be checked and the user should be assigned a role within the organization along with active dates. Finally, the "Save" button must be clicked in order to add the user. For definitions of possible roles refer to Section 10 of this manual.
 - b) If no users were found that matched the search criteria, the organization's administrative user should proceed to step five below.
- 5) Having found no match in the system the organization's administrative user should click the "Add New" button. Basic demographic information must be included for the user that requires an account. When the information has been entered, the "Save" button must be clicked.
- 6) **Adding a Writer or Viewer to your application:** *Writers and Viewer* roles in an Organization *are not automatically attached* to each application. The administrative user must add a writer or viewer to the Organization first, as

explained above, then to the application, once it's created. To attach someone to an application, open the application, use the Add/Edit People function under Management Activities: Administrative Links. Their name should already appear in the list of members: place a "check" by their name, choose their role for this application, give them a start date in the correct format, then Save.

4. Communication from GMS

There are a variety of ways that you can receive information from the GMS.

4.a. Automatic Email Notifications

Automatic email notifications may be sent to you periodically throughout the grant year. These messages will be sent via the system according to an automatic process or as the result of a user-triggered event. These messages might accompany the creation of an application, the submission of an application, or a pending due-date that is approaching. These messages are intended to help you know what is occurring in the system that pertains to you or your organization. These messages may also be sent by DEHCD personnel.

In order to receive these messages, it is important that you include an active, frequently used email address when creating your contact record in the system. If you provide an incorrect email address or an address to an account that is either inactive or full, you will not be able to receive these important messages.

Be sure to add help@intelligrants.com to your safe list if you use spam blockers.

4.b. System Messages

In addition to the automatic email notification, there is an area referred to as the System Messages that manages messages sent to you either from the system itself or from DEHCD personnel. You can view or edit your System Messages by following these steps:

MY MESSAGES		
Recent Unread System Messages		
Flag	Subject	Date
	Application Submitted	8/6/2008 3:22:16 PM
View all system messages		

Click the Subject of a message or click the "See All" link from the My Messages section on the Main Menu.

- Clicking the Subject of a message will take you to the message itself. You can read the message from that screen and then may perform any of the following actions:
 - Click the "List" button to view a full list of your messages in your My Messages folder.
 - Click the "Delete" button to delete the message.
 - Choose a folder from the dropdown list and click the "Go"
- Clicking the "See All" link will bring you to the My Messages folder where you may perform any of the following actions:

- (1) Click the Subject of a message to read a message in the folder.
- (2) Click the "Folder Administration" button to create a new folder in which to store system messages.
- (3) Click a folder name to see all of the messages in that folder.

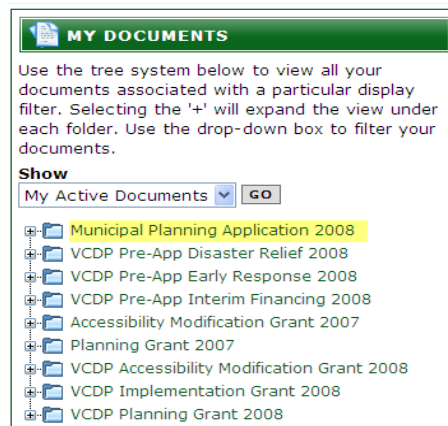
Automatic email notification and system messages will help you to know the events that are occurring in the GMS and will keep you up-to-date on the progress of your grant related items.

5. The Application Process

5.a. Creating an Application

Only those with the role of Administrator or Authorizing Official will be able to "create" an application in the GMS. In order to create an application, please follow the following steps.

From the Main Menu, look at the My Documents section. This section will show you all of the grant programs where you either have existing applications in the system, or where you may initiate a new application. For the Municipal Planning Grant program you will see a "Create New" link beneath the name of "Municipal Planning Application" at the top of the list. Click the "Create New" link. (If you do not see the "Create New" option click on the "+" box left of "Municipal Planning Application" to expand contents of the folder.)






1. You will see a confirmation page asking you to confirm your selection. Click the "I Agree" button.
2. Please Do NOT attempt to use the "carry forward" option, or any option appearing in the dropdown list above the agreement statement.
3. An application will be created for you and you will be redirected to the Application ("Proposal") Menu.

Following the creation of an application a link to the record will appear on the Main Menu for all of those within the organization with Authorizing Official and Administrator roles. (Writer and Viewer roles will need to be "added" to a created application in order to see it on their Documents section. Please see Add/Edit People 5b below.)

The link to the application will appear in the My Documents section under the "Municipal Planning Application." The link format is shown below.

Link Format: Grant Abbreviation – Fiscal Year – Organization abbreviation – Unique Identifier.

	MP-2008-MichelesOrg-00080 [MPG Application Submitted]
	MP-2008-MichelesOrg-00081 [MPG Application In Progress]
	MP-2008-MichelesOrg-00082 [MPG Application Submitted]

Click the link to return to the Application menu.

5.b. Add/Edit People

Writers and Viewer roles in an organization are not automatically attached to each application. The administrative user must add any person with those roles to the Organization first, as explained above, then to the application, once it's created. To attach someone to an application, use the Add/Edit People function under Management Activities: "Administrative Links". The person's name should already appear in the list of members. Place a "check" by their name, choose their role for this application, give them a start date, and Save.

This step is also necessary for anyone who receives a role once the application is already created.

5.c. Application Menu Sections

VERMONT Grants Management System
Agency of Commerce & Community Development

(MPG) Municipal Planning Application: MP-2008-MichelesOrg-00090
Status: MPG Application In Progress
User: WendyAO Tudor
Role: Municipal/Authorizing Official
[Logout](#)

Main Menu | **Proposal Menu**

Main Menu ▶

INFORMATION

Organization: [Michele's MPG Org](#)
(MPG) Municipal Planning Application: MP-2008-MichelesOrg-00090
Status: MPG Application In Progress
Due: 12/31/2008 11:59:00 PM EST

FORMS

- [Read Me](#)
- [Application Summary](#)
- [Project Description](#)
- [Work Plan and Budget](#)
- [Budget Totals](#)
- [Resolution for Municipal Planning Grant](#)
- [Other Attachments](#)

MANAGEMENT ACTIVITIES

- My Reports
 - DHCA Queries
 - [Modifications Summary](#)
 - MPG Reports
 - [MPG Budget Summary Report](#)
- Manuals and Guides
 - [VCDP User Manual](#)
 - MPG Manuals
- Administrative Links
 - [Add/Edit Organizations](#)
 - [Add/Edit People](#)
 - [Check for Errors](#)
 - [Status History](#)
 - [Date Modification Request](#)
 - [View Modification History](#)
 - [Document Availability](#)
 - [Manage Review Process](#)
 - [View Full PDF](#)

The Application Menu (referred to as "Proposal" Menu on the screen) is organized into various sections that help to organize the application tasks and information. These sections are described below.

5.d. Information Section

The Information section contains important information about the application such as the organization that initiated the application, the application identifier, and the status.

INFORMATION

Organization: [Michele's MPG Org](#)
Municipal Planning Application (MPG): MP-2008-MichelesOrg-00082
Status: MPG Application Submitted
Due: 12/31/2008 11:59:00 PM EST

5.e. Status Management Section

The Status Management section allows an applicant user the ability to push the application to the next status level. Only users with the ability to move the application to the next status will see the status management section. Review the next possible status that appears in the window. If the application is complete and you're ready to push the application to the next level, click on Change Status.



STATUS MANAGEMENT

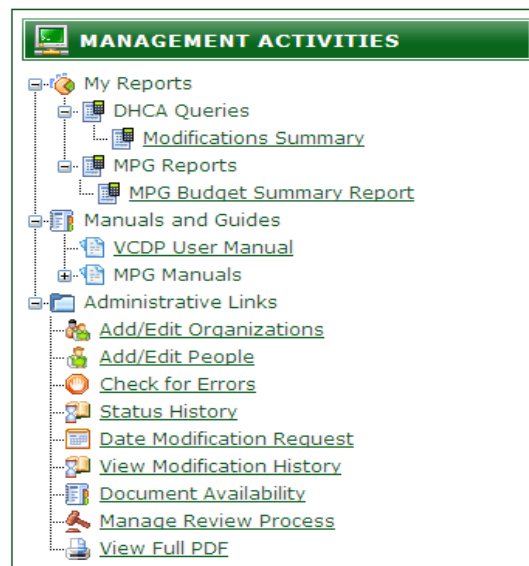
Next Possible Statuses:

MPG Application Submitted ▼

CHANGE STATUS

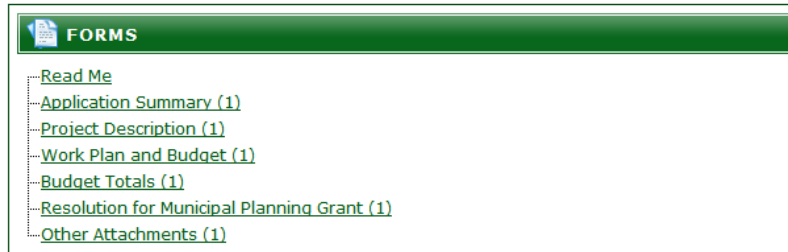
5.f. Management Activities Section

The Management Activities section allows an applicant user the ability to add/edit organizations and people to/from the application and view the status history of the application. You can also generate and "View Full PDF" of your completed application here. (Full PDF does not include the MPG Budget Summary Report.)



5.g. Forms Section

The Forms section is where the vast majority of the work in an application is completed. This section contains all of the forms that are necessary to complete prior to submitting the application. To create or edit an application form simply click the name of the form. Always “Save” your work.



6. Application Form Completion

The various forms in the Forms section of your application must be completed before you can submit your application. The following sections will lead you through the steps necessary for accomplishing that goal.

6.a. Forms Navigation

There are two basic methods for navigating through the forms of your application. You may either use the Menu at the top of any page within the application, or you may use the treeview on the Application Menu.

The image shown below is the Menu with the cursor hovering over the “Municipal Planning Application (MPG) Menu” link. To select a particular form in the application, hover over the “Application (MPG) Menu” then select the form you want to access from the dropdown menu.

To return from a form to the Proposal Menu page (Form section in treeview) click directly on the “Application (MPG) Menu” bar. To return to the “Main Menu” page, simply click the “Main Menu” link to the far left.

Note: At the top right of each form is a green “Show Help” link. This link will open more information to you about that particular form.

VERMONT Grants Management System
Agency of Commerce & Community Development

Main Menu ▾ Actions ▾ **Municipal Planning Application (MPG) Menu ▾** Related Pages ▾

SAVE **ADD** **DELETE**

Created By: Ingulsrud, F
Last Modified By: Ingulsrud

WORK PLAN AND BUDGET (2)

- Read Me
- Application Summary
- Project Description
- Work Plan and Budget (2) ▾
 - Work Plan and Budget: 1 Inventory Resources
 - Work Plan and Budget: 2 Public Outreach
- Budget Totals
- Resolution for Municipal Planning Grant
- Other Attachments

Fill out one page for each task. To add another task, click SAVE and then click ADD.

Task Number: 2 *

Task Name: Public Outreach *

Description of Task: Meet with local organizations of all kinds to discuss project and hear other views. Conduct 3 well-publicized public meetings. 128 of 800 *

Responsibility: Planning Commission *

Paid Personnel: Consultant *

If other specify:

Hours: 20

Hourly Rate: \$80.00

Personnel Cost: **\$1,600**

Material Description: publicity flyers, mailings and refreshments at meetings

Materials Cost: \$100

Total Cost: **\$1,700**

SAVE **ADD** **DELETE** **VIEW PDF** **ADD NOTE**

The treeview on the Application Menu is another way to navigate to each of the forms in the application.

FORMS

- [Read Me](#)
- [Application Summary](#)
- [Project Description](#)
- [Work Plan and Budget \(2\)](#)
 - [Work Plan and Budget: 1 Inventory Resources](#)
 - [Work Plan and Budget: 2 Public Outreach](#)
- [Budget Totals](#)
- [Resolution for Municipal Planning Grant](#)
- [Other Attachments](#)

6.b. Form Completion

When filling out an application form it is suggested that you first complete all of those fields for which you have information. Not everyone in each organization will have all of the information necessary to complete each form. Complete as much of it as you can and then click the "Save" button. Fields followed by red asterisks are required fields. The large text area fields do not recognize all types of formatting. **The website will timeout due to inactivity so be sure to save often. If the system times out there is no guarantee that the data recently entered will be saved. If you've timed out, do not use your "back" button to find the page you were on. Your new data will not be saved.**

Any form that has an “Add” button allows you to have multiple instances of that form. The following Work Plan and Budget page needs to be completed for each project task. Save the page, then select “Add” for each additional task.

VERMONT Grants Management System
Agency of Commerce & Community Development

Municipal Planning Application (MPG): MP-2008-MichelesOrg-00081
Status: MPG Application In Progress
User: Faith Ingulsrud
Role: Municipal/Authorizing Official
Logout

Main Menu ▶ Actions ▶ Municipal Planning Application (MPG) Menu ▶ Related Pages ▶

SAVE **ADD** **DELETE** **VIEW PDF** **ADD NOTE**

The information has been saved.

Created By: Ingulsrud, Faith on 8/8/2008 2:14:21 PM
Last Modified By: Ingulsrud, Faith on 8/8/2008 2:14:53 PM

WORK PLAN AND BUDGET

Fill out one page for each task. To add another task, click SAVE and then click ADD.

Task Number: 1 *

Task Name: Inventory Resources *

Description of Task: Overlay available maps and check on the ground with a windshield survey. *

72 of 800

Responsibility: Consultant *

Paid Personnel: Consultant *

If other specify:

Hours: 15

Hourly Rate: \$80.00

Personnel Cost: \$1,200

Material Description: Travel expense for survey

Materials Cost: \$200

Total Cost: \$1,400

SAVE **ADD** **DELETE** **VIEW PDF** **ADD NOTE**

Once two pages have been saved, a dropdown list appears in the upper right-hand corner with a GO button beside it. To navigate from one task to another, select the task you wish to revisit and click on the GO button.

6.c. Automatic Calculations

When possible, the GMS will automatically calculate totals for you. The “Work Plan and Budget” page is a good example of this. When the page is saved the system will use the values that you have entered from the top section of the page and populate the table below with the values to be calculated. The GMS makes it easier for you by doing much of the math that is required in the application.

WORK PLAN AND BUDGET

Fill out one page for each task. To add another task, click SAVE and then click ADD.

Task Number	1
Task Name	Inventory Resources
Description of Task	Overlay available maps and check on the ground with a windshield survey.
	72 of 800
Responsibility	Consultant
Paid Personnel	Consultant
If other specify	
Hours	30
Hourly Rate	\$80.00
Personnel Cost	\$2,400
Material Description	Travel expense for survey
Materials Cost	\$200
Total Cost	\$2,600

6.d. Pre-populated Form Fields

Where possible the GMS will pre-populate data entered in previous sections of the application. For example the name of the municipality will appear automatically on the Application Summary Form.

6.e. Uploads

For some pages, further documentation or information in addition to the application question may be required. In those situations, a file upload field may be provided to allow you to upload a file instead. Files of the following types are allowed as uploads: bmp, doc, gif, jpg, pdf, png, ppt, tif, txt, wpd, and xls. To upload a file, click the “Browse” button.

☐ N/A ☐ Mail to DHCA

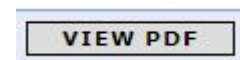
Browse to the folder that contains the file you would like to upload and either double-click the file or click the file and then click the “Open” button.

The maximum permissible size for an uploaded file is 4 MB.

You must then click the form’s “Save” button to save the uploaded file.

6.f. Printable Versions

Although on any page you can choose to click “File”, “Print” to print the page, a better printing option exists. In many pages a “View PDF” button will be available after the form has been saved that will automatically create a PDF for you with the data that you provided in the form.



These dynamic PDFs can be printed, or saved to your computer for reference.

Additionally, the entire application can be viewed in PDF format by clicking on the “View Full PDF” link in the Management Activities section on the Application Menu. (Note: The Budget Summary Report is not included in the Full PDF and must be generated separately.)

6.g. Submitting your Application

The Authorizing Official for your municipality is the only person authorized to submit your Application. When the application is believed to be complete and no more changes are required, the Authorizing Official can choose to submit.

To submit, the Authorizing Official must:

- 1) Go to the Status Management section.
- 2) Be sure that “Application Submitted” appears in the window as the “next possible status”
- 3) Click the “Change Status” button.
- 4) If any errors exist in the application they will appear at that time and they must be fixed before it can be submitted. These can be found prior to submission, find “Check for Errors” in the “Management Activities” section.
- 5) If no errors exist, the Authorizing Official will be prompted to confirm his or her decision to submit.
- 6) A system email will follow if successfully submitted.

It is important to note that once an application is submitted, it will enter into a read-only status and cannot be changed!

7. Grant Decisions

You will be notified of our Department’s decision regarding your application via the online email notification system. You will receive one of these three possible email notifications:

- 1) **Grant Agreement Offered** – A fully funded grant agreement will be online for you to view. The email will guide you to review the Grant Agreement Process below.
- 2) **Application Modifications Required** – You are being offered partial funding for your project and will be directed to go online to modify your workplan task pages to adjust for the reduced amount of funds. If your modifications are approved by the Department, you will then receive the Grant Agreement Offered notification.
- 3) **Application Denied** – Unfortunately, we can’t fund all the application projects so some will receive emails informing them that their application will not be funded this fiscal year.

8. Grant Agreement Process

COMPLETE GRANT AGREEMENT

1. Log on: <https://development.grants.vermont.gov/>.
2. Generate your grant agreement

- a. Select your application from the Municipal Planning Application folder. If your application is not visible, select All My Documents from the drop down menu and click GO.
- b. On the FORMS tree, click on "Agreement Document."
- c. Click on the link to "Generate the Contract," then "View PDF," then "Open".

3. Review the Grant Agreement

Make sure the information about your grant is correct and that you understand the terms of the grant agreement. The Budget Summary Report will now be Attachment A of your grant agreement.

4. Accept Grant Agreement

- a. Return to "MPG Proposal Menu."
- b. Select "MPG Grant Agreement Accepted" under STATUS MANAGEMENT then CHANGE STATUS. If you wish to cancel the application, and not accept the offered funding, select "MPG Application Canceled," then CHANGE STATUS.

5. Print, Sign and Mail Signature Page

- a. Generate grant agreement and print first page. The Municipal CEO (Authorizing Official) signs it.
- b. Mail to DEHCD:

Municipal Planning Grant Program

Vermont Department of Economic, Housing and Community Development
One National Life Drive, 6th Floor
Montpelier, VT 05620-0501

6. After we receive the signed signature page, you will be:

- a. electronically notified of the "Grant Awarded" status of your grant;
- b. able to view your executed grant agreement online (on DEHCD Staff Attachments page); and
- c. able to submit your first requisition (see "Requisitions" box below).

9. Grant Management

In this section, instructions focus on the various functions inherent in managing your grant.

GRANT START-UP

1. Notify your municipal Clerk and Treasurer of the grant award and provide them a copy of the grant agreement signature page and requisition (if submitted). Request that a dedicated accounting number be established for the grant and determine the best way to document grant income and expenses (see Closeout Documentation below).
2. Set up a [Summary Ledger](#) to keep track of grant expenditures. Grant administrators must maintain financial records throughout the progress of the grant project. Expenses related to your work plan and budget, as of December 31, 2008 and through May 7, 2010, may be applied to the grant.
3. A [Log of Hours](#) is required if a municipal employee is to be paid with grant funds.
4. A [sample press release](#) is available. Note that all press releases, public communications or products related to your grant project must reference the support from a Municipal Planning Grant awarded by the Department of Economic, Housing & Community Development. (This helps ensure funding is available in the future.)

5. To access your grant, select and open your grant from the "Municipal Planning Grant" folder in the MY DOCUMENTS section of the "Main Menu." Here you can access Requisitions (under RELATED ITEMS), Amendment and Close Out forms (in the FORMS tree).

9.a. Requisitions

ONLY the MUNICIPAL/AUTHORIZING OFFICIAL can "Submit" the requisition.

MPG allows grantees to requisition (request) funds at three separate times:

First – Request advance payment of 40% any time after grant agreement executed and grant is in "awarded" status.

Second – Submit mid-project payment request of 30% along with a completed "Progress Report" by due date (for due date see page 1 of Attachment B of your grant agreement, Payment Provisions). An e-mail reminder and instructions will be sent to you.

Final– Last payment is made on a reimbursement basis when the project and its deliverables are completed and submitted. Invoices must show that you have spent or obligated all grant funds no later than the "grant period end date" (see Period of Performance on grant agreement for this date). Unused, ineligible or undocumented costs must be returned.

What: Requesting funds from the Department of Economic, Housing and Community Development.

How: Create a new requisition:

- 1) Go to Related Items (bottom left side of "proposed menu" page)
- 2) Click on "create new"
- 3) Read agreement message and click "I agree."
- 4) Complete the 2 forms on the right side.

Completing the Budget Status Requisition form:

- 1) Check appropriate requisition box(es).
- 2) Fill in the "Current Requisition Amount" (numbers only); SAVE

Completing the Progress Report form:

- 1) First requisition: Check N/A, then SAVE
- 2) Second requisition: Complete the form, SAVE. Expenditure Totals will appear at bottom after saving page.
- 3) Third requisition: Check N/A, then SAVE The final requisition accompanies the closeout documentation for the grant.

The third requisition is a reimbursement and should be submitted in conjunction with your close out materials, See [Closeout Instructions](#).

Submitting the Requisition:

Only the Municipal/Authorizing Official can, and ONLY the M/AO should:

- 1) Go to Related Items and open the requisition (if M/AO created and filled out the requisition, then you are already there)
- 2) View "Status Management" box on left side.
- 3) Only the Municipal/Authorizing Official will see **"Requisition Submitted"** in the "next possible status" window.

PLEASE BE CERTAIN that **"Requisition Submitted"** is in the "next possible status" window, and NOT "Requisition Cancelled" or "Closeout Documentation Submitted."

- 4) M/AO clicks on "Change Status" button directly below "Requisition Submitted" window.
- 5) Read agreement message and click on "I agree."

You will be notified by a system email that your requisition has been successfully submitted.

NOTE: In the event there is a Requisition which has been submitted to the Department, but the funds have not been received, please call the Department at 828-5249 to determine the Requisition status. Please allow 2-3 weeks for requisitioned funds to be processed after submittal.

9.b. Progress Reports

- 1) First requisition: Check N/A, then SAVE
- 2) Second requisition: Complete the form, SAVE
- 3) Third requisition: Check N/A, then SAVE The final requisition accompanies the closeout documentation for the grant.

The third requisition is a reimbursement and should be submitted in conjunction with your close out materials, See [Closeout Instructions](#).

See Requisition Instructions above to submit the progress report along with your requisition.

9.c. Amendments- Work Plan & Budget

What: You'll need approval from MPG Staff to make changes in your Work Plan & Budget. Please remember that we do not permit changes to final products, grant award amounts, or grant period dates. Minor changes in the work plan & budget (shifting dollar amount between approved tasks in the work plan) do not require an amendment. Please call 828-5249 if you're not sure what requires an amendment.

Who: **Only** the Authorizing Official or the Administrator roles can move this process along through the appropriate status changes. However, the Writer role is able to view/write/and save the form(s) once the appropriate status changes have been made.

How: If you wish to amend your Work Plan and Budget task pages, please follow these steps.

Log on and open your municipal planning grant:

- 1) This first step will allow you to request feedback from DEHCD Staff on your proposed amendment. In the Status Management box, use the dropdown list, select "Amendment Request in Progress" in the window. Click "Change Status" button.
- 2) Open the Amendment Request form (on forms tree at right), fill out form and Save.
- 3) Submit your amendment request to our staff: With "Amendment Request Submitted" in the next possible status window, click "Change Status" button.
- 4) After DEHCD staff reviews your request, you will receive a system email with an Amendment Request Approved or Amendment Request Denied message.
- 5) With either message, review any staff Comments in response to your request at the top of the Amendment Request form.
- 6) If Amendment Request is Approved
 - a. Click Change Status button with "Amendment In Progress" in window
 - b. Work plan task pages are now available to Revise and Save
- 7) When task page(s) are amended to your satisfaction:
 - a. Review Budget Totals page for correct totals and Save (even if no changes are made)
 - b. Enter any and all Task pages that haven't been revised and Save
 - c. Click on Change Status with "Amendment Submitted" in the window
 - d. You may be directed to open and Save any unsaved task pages and Budget Totals page before the system will allow you to "submit" the Amendment. (see a. and b.)
 - e. An agreement message will appear, read it and click "I agree."
- 8) MPG staff reviews your proposed Amendment; they will do one of the following:
 - a) Approve your Amendment: Your new Budget Summary Report, Attachment A of your grant agreement, will reflect those changes.
 - b) Deny your Amendment: Go online to review relevant staff comments on Budget Totals page
 - c) Require Modifications to your Amendment: Go online to review required modifications on Budget Totals page. Revise page(s) accordingly. Change Status to Amendment Modifications Submitted. Your modifications will be reviewed by DEHCD staff.

System emails will be generated to update you throughout the process. Please call 828-5249 if you have any questions.

9.d. Amending Your Resolution

Adding a new Municipal/Authorizing Official account to fulfill this online role? (M/AO must be an executive of the Town, i.e. a Town Administrator, Town Manager, or Member of Selectboard). You will need to amend your Resolution.

Under "Amendments" on Forms Tree, click on "Amend Your Resolution."

Please follow those instructions. There is a link to a new Resolution form. The new M/AO role will need to create a new user account in the grants management system as well as to have that account validated by our system administrator.

9.e. Final Report – Closing Out the Grant

The close out process includes two Status Changes;

- 1) Submit the close out forms/documentation (M/AO or Admin)
- 2) Submit the requisition (M/AO).

You will receive system emails throughout the process.

Please review the “**Grantee Checklist**” for details on required close out documentation.

Part One: Close out Forms and documentation submittal (AO or Admin)

Please complete the following forms online, and SAVE:

- 1) Final Project Summary form
- 2) GIS data form(s): If GIS work was done with grant funds, one form for each data layer created.
- 3) Use the “Closeout Documentation” form to upload the following:
(If mailing, list each document name on the Closeout Documentation form and check “mailed to DEHCD”)
 - a) Financial Documentation (Please see Grantee Checklist on Forms tree for required financial documentation)
 - b) Final Product(s)

To electronically submit your close out

When all of the above has been completed/uploaded, the Authorizing Official or the grant Administrator can click on Change Status while viewing “close out documentation submitted” in the “next possible status” window. CAUTION: Once the status has been changed, you will no longer be able to upload/Save documents or forms.

Part Two: Final requisition

Detailed requisition instructions above.

- 1) Create a new requisition, complete the forms and Save.
- 2) Only an Authorizing Official can then **electronically submit the requisition.**
- 3) You may requisition at this time, for any funds that have been expended, but not yet received from the program. Any funds received but not expended must be returned along with your closeout, and the check made out to the State of Vermont.

Please Note: The payment will be transferred *electronically* from the State Treasurer into your Municipal bank account.

10. Roles Definitions

These definitions are at the heart of the role-based security model employed in the GMS. Roles are used to define who does what in the system and what sort of actions each role should be able to perform at different moments in the grant life-cycle.

Every person associated with an on-line grant application must first create a new user account and then be assigned a role within the online grants management system. Authorizing Officials are assigned by their Legislative Body and their online accounts are validated by the Department of Economic, Housing and Community Development (VEHCD) staff. All other users are validated by the Authorizing Official or Administrator associated with their grant application.

The following are roles for the applicant organization users:

Municipal/Authorizing Official (M/AO) – Must be Chief Executive Officer of the municipality as defined by 10 VSA §683(8) such as a Selectboard member, or is a Town or City Manager or a Town Administrator. No person who is paid through the grant or handles grant funds, including the Municipal Clerk or Treasurer, may be assigned the Municipal/Authorizing Official role. Municipal/Authorizing Officials have the following permissions and functions.

1. Only role with the authority to submit an application and requisitions.
2. Title in the system functions as an electronic signature.
3. Validates/assigns the Administrator role.
4. Validates/assigns Writers or Viewers for the project application or may leave that responsibility to the Administrator.
5. Ability to create, write, edit, review and submit applications.
6. Ability to administer the grant if awarded. (If no Administrator is assigned to the grant, the M/AO will need to perform the Administrator functions.)

Each municipality should have two persons validated as Municipal/Authorizing Officials in the event one is not available at a critical time. (For example, both the Selectboard Chair and Town Administrator could be authorized.)

Administrator – Handles all grant-related tasks for the municipality except the first three M/AO functions listed above. The Administrator role may be assigned to a Town Planner or other staff, a Planning Commissioner or other board member involved in the grant or Regional Planning Commission staff. Administrators have the following permissions and functions.

1. Must be added to the grants management system by a Municipal/ Authorizing Official (or by DEHCD staff in response to contact from the M/AO.
2. Ability to create, write, review and edit applications.
3. Validates/assigns Writers or Viewers to the grant applications.

4. Ability to administer the grant if awarded.

The Administrator role, when authorized by the M/AO at the *Organization* level can create applications on behalf of the municipality but when authorized at the *Application* level, cannot create new applications. A non-municipal partner such as a RPC, should be given the Administrator role within the *Application* if the partner is going to administer the MPG grant once awarded.

Writer – Can write, edit and review applications. The writer is added to a specific grant application by the M/AO or the Administrator. Writers will need to be added to new applications (See Add/Edit people above).

Viewers – Can read the grant application, and if the grant is awarded, can view grant-related documentation in the system. Viewers will need to be added to new applications (See Add/Edit People above).